People and Money

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Employee Guide - How to Enter Contact Details into the System

Employee

Estimated Time to complete: 8 minutes

Before you begin, make sure you know…

1. There is currently no connection between the People and Money system and the University’s telephone/website directories online so if you update your contact details on the system, these won’t automatically get updated elsewhere. Please keep in mind to maintain all areas where this info is displayed and keep them up to date.

2. The system must always have a phone contact so if you wish to edit your existing phone number, first add a new one in and only then delete the old one. Otherwise, you won’t be able to delete the existing number.

In Brief…

This is a simple overview of the process.

1. From the Home page, click the Navigator menu.

2. Open the Me section, then click Personal Information

3. Choose Contact Info

4. Choose Communication then click Add. 

5. Enter Phone Details, Email Details and Other communication accounts
6. Submit.

7. Go to Address, then choose Add.

8. Enter Address details, then Submit.

For detailed guidance, see the next section.

In Detail...

1. From the Home page, click the Navigator menu.

2. Open the Me section, then click Personal Information.
3. Choose **Contact Info**.

Phone Details:

1. Choose **Communication** then click **Add**.
2. Choose **Phone Details**.

3. Enter the following details:
   a. **Type** is a dropdown option – Select as appropriate.
   b. **Country** is a dropdown option – Select as appropriate.
   c. **Area Code** – as appropriate.
   d. **Number** – as appropriate.
   e. **Primary** - Check this box if this is the main phone number.
   f. **Comments** – as appropriate.
   g. **Attachments** – as appropriate (Drag and Drop OR Click and Select).
h. **Submit** to Save.

**Note:** The system must always have a phone contact so if you wish to edit your existing phone number, first add a new one in and only then delete the old one. Otherwise, you won’t be able to delete the existing number.

**Email Details**

1. Choose **Communication** then click **Add**.

2. Choose **Email Details**.
3. Enter the following details:

a. **Type** is a dropdown option – Select as appropriate.

b. **E Mail** – as appropriate.

c. **Primary** - Check this box if this is the main E Mail.

d. **Comments** – as appropriate.

e. **Attachments** – as appropriate (Drag and Drop OR Click and Select).

f. **Submit** to Save.
1. Choose **Communication** then click **Add**.

2. Choose **Other Communication Accounts**.

4. Enter the following details:
   
   a. **Provider** is a dropdown option – Select as appropriate.
   
   b. **Account Name** – as appropriate.
   
   c. **Comments** – as appropriate.
   
   d. **Attachments** – as appropriate (Drag and Drop OR Click and Select).
   
   e. **Submit** to Save
Address

1. Choose **Address**, then click **Add**.

2. Enter the details as below:
   
   a. **Country** is a dropdown option – Select as appropriate.
   b. **Type** is a dropdown option – Select as appropriate.
   c. **Start Date** – as appropriate.
   d. **Address Line 1** – as appropriate.
   e. **Address Line 2** – as appropriate.
   f. **Address Line 3** – as appropriate.
   g. **City or Town** – as appropriate.
h. **County** – as appropriate.

i. **Postcode** – as appropriate.

j. **Primary** - Check this box if this is the main Address.

k. **Comments** – as appropriate.

l. **Attachments** – as appropriate (Drag and Drop OR Click and Select).

m. **Submit** to Save.

Please refer to **Glossary**